



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Information Management Bureau Chief

Job Code Title

Program Manager IV

Pay Band

7d

Job Code Number

111917

Information Management and Technology Division

Information Management Bureau

Fair Labor Standards Act

Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state agency liquor stores and administers the laws governing the sale, taxation, and licensing of alcoholic beverages and tobacco products; returns unclaimed property to its rightful owners; and determines how state taxes and liquor and tobacco laws apply to Indian Tribes and tribal members in Indian Country.

The Information Management and Technology Division serves as the operational foundation for the department's business units. Through secure, up-to-date computing and processing environments the division's Information Technology Bureau (IT) and Information Management Bureau (IM) contribute to the department's overall efficiency in document and payment processing while ensuring confidentiality, integrity, and availability of taxpayer data, whether in paper or electronic form. In providing these services, the division enables the department to meet its business objectives and facilitates its mission to serve the citizens of Montana. The division also includes the Administrative Team. The Information Management Bureau ensures secure handling and delivery of taxpayer information, payments, and data to the appropriate systems and staff. The bureau is organized into four units providing tax return and payment processing including Account Maintenance and Cashiering, Information Capture, Electronic Services (E-Services), and Mailroom and Imaging.

Job Responsibilities

The IM Bureau Chief allocates financial and staff resources; plans and directs the programs and services of the bureau; administers bureau policies, administrative systems, operations, and budget; and coordinates special projects. The technical aspects of the work units are left to the unit managers, specialists, and business experts. The position reports to the division administrator; directly supervises unit managers; and indirectly supervises all other bureau staff.

- **Bureau Administration, Planning, and Management 65%**

Assists the division administrator in the development of short and long-range goals and objectives of the bureau. Plans, directs, and coordinates bureau programs including strategic planning; bureau and division representation; policy development; legislative analysis and testimony; and other planning activities to ensure the ongoing effectiveness, compliance, and achievement of overall division goals.

1. Determines the overall direction of the bureau. Establishes goals and objectives and develops a comprehensive short- and long-term work plan compatible with the broader departmental and legislative missions and goals. Provides substantive input on the department's overall strategic plan.
2. Determines organizational structure of the bureau. Sets program policy and coordinates with department operations and programs to meet the overall mission of the agency.

3. Analyzes the impact of changes to state and federal regulations and policies affecting bureau programs. Develops and implements standards, policies, and procedures to ensure ongoing effectiveness and compliance with laws and regulations.
4. Evaluates the effectiveness of bureau programs. Periodically reviews emerging issues and trends to assess how they affect current goals, operating environment, and assumptions.
5. Builds long-term internal and external relationships with other department divisions, local governments, taxpayers, and community groups. Negotiates and resolves issues with internal and external customers and determines the appropriate method to resolve disputes. Participates in statewide departmental activities. Builds a network of peer relationships within and outside the department.
6. Reviews and analyzes bureau activities and data to aid planning, resource management, and public policy development. Considers the effects of decisions or recommendations on public and legislative relations. Provides advice or consultation to the division/department management team, external agencies, and others.
7. Leads planning efforts related to processing of tax information and payments. Evaluates proposals for new equipment and systems or revisions of existing systems. Determines options and alternatives, costs and benefits, scheduling issues and appropriate staffing levels.
8. Researches business needs and requirements. Plans and develops processing operations enhancement projects. Ensures effective use of resources. Identifies project objectives, analyzes user needs and software requirements to determine feasibility within time and cost constraints.
9. Develops updates and recommendations for the division administrator on potential problem areas and changes within the bureau including issues such as the effectiveness of programs; actual or potential revenue issues and concerns; proposed agency actions and responses; and public relations.
10. Reviews and recommends new legislation and administrative rules. Gathers input from the public, other governmental agencies, and bureau staff. Reviews current Montana statutes and those of other states. Develops proposals for legislation or administrative rules. Presents proposals to the division administrator and may present them before the legislature. Writes fiscal notes.
11. Monitors the use of services, funding, and staff to ensure effective use of bureau resources. Assesses the need for additional staff, equipment, and services. Assesses the impact of changes in technology, state and federal requirements, and department operations. Determines methods to increase efficiency.
12. Compiles, reviews, and formulates the budget for the bureau to allocate resources and comply with legislative intent and statute. Prepares the bureau budget. Researches and analyzes the cost of services. Prepares cost and revenue estimates. Submits justifications for needed materials and equipment. Preparing various budget reports.
13. Projects future expenditures and year-end balances; identifies areas of concern and discrepancy; and makes status reports to the division administrator to determine program budgetary actions.
14. Directs the procurement, purchase, and inventory control of bureau equipment and supplies. Ensures adequate and contemporary equipment and technology are available within budget constraints. Ensures compliance with state accounting and property management requirements.
15. Effectively represents the bureau, division, and department at meetings, conferences, hearings, committees, and other proceedings and events.
16. Serves as a member of applicable management teams. Appropriately participates in team decision-making and associated activities.
17. Keeps abreast of legislative, regulatory, management directive, organizational, or other changes or initiatives that may affect assigned area, analyzes impact, and recommends or takes necessary action to address them.
18. Develops various reports, spreadsheets and other tracking methods to monitor bureau status, work progress, and performance. Identifies information needs. Determines and implements effective tracking and reporting systems. Monitors collected data to identify areas of concern. Provides analysis to management and others to resolve problems, make legislative presentations, and identify areas of strength and weakness.

- **Staff Leadership, Management and Supervision 30%**

Incumbent is responsible for leading staff; delegating the management of division programs to subordinate managers appropriately; and managing the day-to-day activities of the bureau. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.
2. Provides leadership and mentoring opportunities to direct and coordinate the activities of staff through subordinate managers to ensure efficient operations and increase productivity including implementing and monitoring corrective action plans to solve problems.
3. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
4. Maintains an atmosphere of safety within the region. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
5. Makes and accepts responsibility for decisions necessary to carry out the region's mission.
6. Accepts direction and feedback from supervisors and follows through appropriately.
7. Provides appropriate direction and feedback to subordinate supervisors. Ensures that delegated responsibilities are carried out and delegated authority is used appropriately.

Management

1. Conducts strategic planning in coordination with the division administrator to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; region needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, region performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.

9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the region follows department expectations regarding disclosure and employee confidentiality.

Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.
3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.
4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties.
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, procedures, and collective bargaining agreements.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

• **Other Duties as Assigned 5%**

1. Performs a variety of other professional duties in support of bureau and department operations.
2. Coordinates special projects.
3. Attends meetings and conferences.
4. Represents the department to local groups and communities.
5. Attends ongoing training and educational programs as directed.

Job Requirements

To perform successfully as a bureau chief, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team; make sound decisions and be accountable for them; generate innovative ideas; and have personal initiative. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and

resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

The incumbent must demonstrate professional knowledge of taxpayer data and payment processing principles and practices. Knowledge of applicable state and federal regulations, statutes, and policies; public administration and management including strategic planning; project management; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program planning; quality assurance methods; organizational development; project management; resource allocation; leadership techniques; governmental organizational structure, accounting, and budgeting; legislative and administrative rule processes and guidelines; and state and department policies, procedures, and precedents is required. The work also requires knowledge of computers and database management including state and department information systems (GenTax, SABHRS); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; business communications; records management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in public administration, business administration, accounting, economics or related field, and seven years of job-related experience including three years of direct supervisory, budgetary, and audit program management experience.
 - Work experience should include professional level experience in taxpayer data and payment processing as well as five years of experience in managing a program.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the division. At times, the incumbent will deal with angry, hostile, and

difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours routinely exceed 40 hours per week, which may include working evenings and weekends, especially during peak processing seasons and leading up to and during legislative sessions. May involve minimal travel therefore a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Department Director Review: The statements in this job profile are accurate and complete.

Signature: Margaret Kauska, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____